Automation Blueprint ©

1. Choose the desired process? – Stellaris Email Process
2. Opportunity Assessment Overview (we have worksheets for this)? Yes
3. NTT Specific challenges to choose a project (environment, type of client relationship, ETC)?

* Setting up environments within NTT for different clients which has applications hosted in their own network
* Getting security clearance for providing service Accounts/Bot id’s
* Getting data for testing/production dry run

1. What is the ROI and who needs to approve this?

Sending daily reports to business users on with data that helps to calculate ROI.

ROI needs to be approved by SME- Cynthia Wilkinson

2.     Document desired process

a.     Who is involved in the documentation process?

Solution Architect- Varija Paparaju

b.     What stakeholders need to be engaged?

Solution Architect – Varija Paparaju

Business user – Cynthia Wilkinson

Business Analyst – Kamal K

1. What are the documents that need to be filled out (and put them in a repository)?

Process design document

Solution design document

Process Flow Diagram

Test case document

1. What are the challenges we have faced (FYI Documents and FAQ documents in a folder) and FAQ section?

1. What is the timeline we can anticipate for the conclusion?

The anticipated timeline for the conclusion is 05/23/2019.

3.     Approval and go forward

a.     Who will be signing off on the documents?

SME- Cynthia Wilkinson

b.      Who are the stakeholders in the process?

Solution Architect – Varija Paparaju

Business user – Cynthia Wilkinson

Business Analyst – Kamal K

Project Manager – Vincent S

c.     What templates are needed for this?

An email stating sign off for following documents

Process design document

Solution design document

Process Flow Diagram

Test case document

Deployment plan

4.     Infrastructure

a.     What are the typical hardware requirements – we should keep this simple such as

                                               i.     1 unattended robot and a Orchestrator to schedule it.

                                             ii.     What environments need to be set up (dev, test, prod, etc)

Dev & Prod environment need to be set up.

                                            iii.     What are the access requirements?

Access Requirements: Application access, Service accounts.

                                            iv.     What is the process for user credentialing?

Create service accounts that never expire.

Use Orchestrator/windows credential manager to store them securely

                                              v.     Who needs to be credentialed and how (how many service accounts, how many admin accounts, how many test)

Bot id & service account for applications needs to be credentialed, one for each environment (Dev and Prod)

                                            vi.     What are the security credentials?

BOT Id’s & service accounts to Access application

                                           vii.     How is this smoke tested?

Should login to applications once

                                         viii.     Who signs off on the infra (i.e. our architect and NTT’s architect)

NTT’s Architect- Kamal K

                                            ix.     What lessons learned do we have from this.

Lessons learned:

* Should start setting up environments in parallel to Design phase. That makes everything ready for development at same time

b.     Governance

                                               i.      What is the PM structure?

Project Manager (Vincent S) 🡪 Business Analyst (Kamal K) 🡪 Architect 🡪 Developer

                                             ii.     Who are the stakeholders for approval?

Solution Architect – Varija Paparaju

Business user – Cynthia Wilkinson

Business Analyst – Kamal K

Project Manager – Vincent S

                                            iii.     What is the escalation pathway?

Developer🡪 Architect🡪 Business Analyst (Kamal K) 🡪 Project Manager (Vincent S)

                                            iv.     What is the change management pathway?

SME (Cynthia W)🡪 Business Analyst (Kamal K)🡪 Architect🡪 Developer

c.     Design and engineering

                                               i.     What documents are required?

Process design document

Solution design document

Process Flow Diagram

Test case document

Deployment plan

Deployment Checklist

                                             ii.     What cadence do we have meetings?

Process understanding call

Daily status call

Requirement clarification call

Change Request call

User Acceptance testing planning call

Production dry run call

                                            iii.     What is the time frame for the creation of the

1. Process Flow

3 Days (24 Hours)

1. Process Definition

3 Days (24 Hours)

1. Solution Design Documents?

3 Days (24 Hours)

                                            iv.     Lessons learned

* Proactive communication is needed to collect process requirements.

1. How do we avoid duplication of effort?

We will avoid duplication of effort by creating Re-usable components for the reusable code. (i.e. Login to SNOW, etc.).

Making sure we have proper documents in place to refer, to avoid repeated questions

1. How do we avoid delays?

To avoid delays, we should make sure that we have all the accesses, Test data in parallel with Design documents. And also any change requests after the PDD sign-off will go after the deployment.

1. How do we avoid having to go back and make changes to the design?

To avoid changes in the design, we should make sure/ confirm the Process flow steps with the Client and take the sign-off.

d.     Development

                                               i.     What does the team look like?

Team of 2 members: 1 Developer, 1 Solution Architect

                                             ii.     What methodology?

Following Agile Methodology.

                                            iii.     How often do we have status calls?

We have status calls on daily basis.

                                            iv.     What are the typical project milestones – create a general project plan

04/10/19 to 04/15/19 – Process Discovery

04/16/19 to 04/22/19 – Documentation & Sign-off

05/01/19 to 05/05/19 – Development

On 05/06/19 – UAT

05/14/19 to 05/22/19 – Testing/Development Tweaks

From 05/23/19 – Go live

                                              v.     What project template are we using – use the template that Vik has for Hiscox

None; we will follow& update the Template from Vik.

                                            vi.     What are the typical components we can reuse?

Reusable components: Login to Remedy Tool

                                           vii.     How do we document the components going forward that will be reusable

We are documenting all the reusable components in a single document for the process for the NTT and storing the components in our GIT hub

e.     Testing

                                               i.     What is the duration?

Duration of the testing: 2 Days (16 Hours).

                                             ii.     What is the methodology?

Testing methodologies: Unit Testing, Integration Testing and User acceptance testing.

                                            iii.     How do we get the test data?

We get test data from SME- Cynthia Wilkinson

                                            iv.     How long do we test?

We test for 2 Days (16 Hours).

                                              v.     How do we anticipate the common issues that go wrong and what are they?

The common issues go wrong are Selector issues, Bot couldn’t find the selectors for particular elements on the screen.

                                            vi.     Who provides the sign off to go forward?

SME- Cynthia Wilkinson

f.      Deployment

                                               i.     What is the strategy to deploy?

We have followed the deployment plan:

We performed the Dry Run.

Let the SME to Review the Logs.

If everything is good, deployed the Process, if not, fixed the issues and then performed Dry Run again, if it’s OK, process will GO-Live.

                                             ii.     How do we ensure continuity of the process?

We monitor the process daily based on the logs. Also email alerts are created in case of any failure

                                            iii.     What is the contingency to perform the process if the robot doesn’t work?

Agents from the client- side will work on this process.

                                            iv.     Who will be monitoring the robot?

SME- Cynthia Wilkinson

                                              v.     What are the acceptable standards to keep this into production?

Code review to be done by Architect

Sign off from business for UAT results

                                            vi.     Lessons learned – what went wrong before?

Change requests at the time of deployment: Change requests should be done after the Go-Live and Deployment should be done as per the sign-off.

g.     Hypercare

                                               i.     How often do we watch the robot – i.e. every hour, do we let it run under supervision every morning?  What is the best practice for this?

BOT will send exception/successful emails to Business users for every email (input) it processed. Best Practice for this is to keep track of these emails for the exceptions transactions and fixing them.

                                             ii.     Lessons Learned

h.     Support

                                               i.     What is the best way to support the model going forward?

2 weeks of warranty period to fix any minor issues. Followed by change requests for any major changes

                                             ii.     What is the escalation pathway?

Developer🡪 Architect🡪 Business Analyst (Kamal K)🡪 Project Manager (Vincent S)

Folders for lessons learned/FAQ and for Common components – Git hub